

A. Abstract-

**MISSION STATEMENT OF THE WHITEWATER VALLEY DISTRICT 9 PRO
BONO COMMITTEE**

The Mission and Purpose of The Whitewater Valley District 9 Pro Bono Committee is to develop, implement, and oversee a workable plan to promote equal justice for the citizens with our District, regardless of economic status, by improving the overall delivery of civil legal services to persons of limited economic means by encouraging, creating, and promoting opportunities for attorneys and others within the legal field to provide pro bono services to persons of limited economic means.

With this Mission in mind, it is the goal of The Whitewater Valley District 9 Pro Bono Committee to provide intake, screening, and referral of prospective clients to attorneys within our District that are willing to provide legal services at no cost. Such services will vary based upon the needs of the prospective client and will range from simply preparing a Child Support Worksheet to representing a prospective client from beginning to end in an involved child custody matter. To reach this goal, attorneys and support staff must be recruited for pro bono service whereby the prospective client's needs can be matched with a particular field of law. Training and legal education for attorneys willing to assist in the pro bono project will be necessary in order to meet the needs of the prospective clients. This may include meetings with other attorneys versed in certain fields of law to attendance at seminars put on by ICLEF or LSOI. In this same regard, the Committee believes that errors and omissions insurance should be maintained by LSOI to cover the attorneys working within the program. Resources in order to assist in publicity of the pro bono program and to help defray the cost of costs of expenses of litigation will be needed. It is important that the Committee establish procedures to ensure the monitoring and follow-up of assigned cases. Finally, the Committee must also establish follow up and monitoring vis-à-vis the attorneys working with the pro bono program in order to provide the necessary support and assistance they need and then to recognize such attorneys for their dedication and service.

B. Data

Courtney Mathews, Plan Administrator
Paralegal, Indiana Legal Services, Inc.
401 South A Street
Richmond, Indiana 47374
T: 765-965-9188
F: 765-965-9217

1. Committee Members

- | | | |
|----|--|-------------------------|
| a. | Hon. James R. Williams
Judge, Union Circuit Court
26 West Union Street
Liberty, Indiana 47353
T: 765-458-5934
F: 765-458-5263 | Chair |
| b. | Tom Alberts
U.S. Bank
800 East Main Street
Richmond, Indiana 47374
T: 765-965-2293
F: 765-965-2209 | Treasurer |
| c. | Carolyn Bunzendahl
Project Coord., RiverValley Resources
Workforce Development Center
3771 South A Street
Richmond, Indiana 47374
T: 765-962-8591
F: | Com At Large |
| d. | Michael A. Douglas
Attorney At Law
7 East Union Street
Liberty, Indiana 47353
T: 765-458-7411
F: | Com At Large |
| e. | Cindy Hartman
Director, Head Start
201 East Main Street
Richmond, Indiana 47374
T: 765-966-7733
F: | Com At Large |
| f. | Jeff Boulden
Attorney, ILS
151 North Delaware Street
Indianapolis, Indiana 47374
T: 317-631-9410
F: 317-631-9775 | Legal Services Provider |

- g. Etta Lundy
United Way of Whitewater Valley
33 South 7th Street, Suite #5
Richmond, Indiana 47374
T: 765-962-2700
F: 765-966-6272
Com At Large
- h. Amy Noe
Attorney At Law
101 ½ South 4th Street
Richmond, Indiana 47374
T: 765-962-3344
F: 765-962-5256
Wayne Co. Bar Assn.
- i. Kelly Persinger
Director, Genesis of the YWCA
P.O. Box 2430
Richmond, Indiana 47375
T: 765-935-3920
F: 765-966-0530
Com At Large
- j. Robert L. Reinke
Senior Judge
3416 Breckenridge Drive
Richmond, Indiana 47374
T: 765-962-2729
F:
Com At Large
- k. Carol B. Smyth
Director, Morrison Reeves Library
80 North 6th Street
Richmond, Indiana 47374
T: 765-966-8291
F: 765-962-1318
Com At Large
- l. John F. Strain
Attorney At Law
P.O. Box 1770
Richmond, Indiana 47374
T: 765-962-1269
F:
Wayne Co. Bar Assn.

m. Staci Terry
Attorney At Law
2 North 8th Street
Third Floor
Richmond, Indiana 47374
T: 765-966-6688
F: 765-966-6618

Wayne Co. Bar Assn.

n. Hon. Barbara Arnold Harcourt
Judge, Rush Circuit Court
Courthouse, North Main Street
Rushville, Indiana 46173
T: 765-932-2078
F: 765-932-2357

Judicial Rep.

1. Governance-

The District 9 Whitewater Valley Pro Bono Committee Board of Directors chose to remain an unincorporated association rather than incorporate. By-Laws were established and approved that provide for members of the Board of Directors to be elected. Six (6) of such Directors shall be elected to terms of one (1) year and five (5) Directors to be elected to terms of two (2) years. Vacancies are to be filled by the Executive Committee. A copy of the District's By-Laws are included as part of this Report and Plan.

2. History/Background-

District 9 serves Fayette, Franklin, Rush, Union and Wayne counties. At this time, while there are several groups which assist the needy throughout the District, there are no other organized pro bono efforts.

3. Plan Administrator-

The Plan Administrator of the District 9 Whitewater Valley Pro Bono Committee is Courtney Mathews, Paralegal with Indiana Legal Services, Inc. 401 South A Street, Richmond, Indiana 47374, Telephone: 765-965-9188, Facsimile: 765-965-9217. Courtney's position is not paid through the District but, rather privately. As Plan Administrator, all telephone calls and inquiries are made through Courtney. Courtney travels the entire District to assist in referrals, publicity, and assigning of cases. As Plan Administrator, Courtney follows through with the attorneys and clients in making sure that the client's needs are met and, then, at the conclusion of the case providing the assessment and monitoring procedures.

4. Monitoring Role

The District Committee will evaluate and record the progress and success of the Plan by issuing volunteer and client satisfaction surveys to participating attorneys and clients that have received services. The committee also believes that the amount of attorney participation is another key to evaluating progress.

(b) Quantity

- (i) 26 attorneys participating
- (ii) 29 clients served
- (iii) 1,015 hours

(c) There are no litigation costs to be reported.

EXISTING SERVICE/PROGRAM

Service/Program Name: Indiana Legal Services, Inc.

Mailing Address: 151 North Delaware Street, Market Square Center,
Indianapolis, Indiana 46024

Phone: (317) 631-9410

Contact Person: Jeff Boulden, Managing Attorney

Sponsoring Agency: Legal Services Corporation

Agency Director: Norman Metzger

Service/Program Information:

Target Population: indigent population

Eligibility Requirements: 150% of poverty guidelines

Service Area: Indiana

Type of Service/Program:

Estimate of Expense per Year:

Funding Source(s): LSC, United Way

Service/Program Description: Indiana Legal Services, Inc. offers free legal assistance to the poor

EXISTING SERVICE/PROGRAM

Service/Program Name: District 9 Whitewater Valley Pro Bono Committee

Mailing Address: 401 South A Street, Richmond, Indiana 47374

Phone: (765)965-9188

Contact Person: Courtney Mathews, Paralegal

Sponsoring Agency: Indiana Legal Services, Inc. **Phone:** (317)631-9410

Agency Director: Hon. James Williams, Chair

Service/Program Information:

Target Population: indigent population

Eligibility Requirements: 150% of poverty guidelines

Service Area: Fayette, Franklin, Rush, Union and Wayne Counties

Type of Service/Program

Estimate of Expense per Year: \$17,860.00

Funding Source(s): IOLTA funds

Service/Program Description: District 9 Pro Bono Committee offers free legal representation to indigent individuals who have civil, legal needs.

D. Problem Statements/Recommendations-

1. PROBLEM IDENTIFICATION:

District 9 has determined that there is a barrier faced by indigent individuals in their effort to resolve problems through the District's particular delivery system because there are not enough attorneys working within the Plan at this time. The Plan is working in Wayne County, but the Plan has yet to become fully operational in the other counties within the District.

2. SUPPORTIVE DATA:

Twenty-six volunteer (26) attorneys are currently active in District 9. Twenty-five (25) of those are in Wayne County accepting pro bono cases in that county, and one (1) of those from Union County accepting a case in that county. The number of intakes taken for individuals seeking assistance in each county is the following: Fayette County- 136; Franklin County- 59; Rush County- 63; Wayne County- 380; Union County- 11.

3. RECOMMENDED ACTIONS TO ADDRESS BARRIERS:

The Committee has determined that Wayne County is functioning as hoped and that more emphasis needs to be put on the outlying counties. The Plan Administrator is scheduling meetings with the appropriate individuals, the Wayne and Union County judges have assisted in garnering support for the program, and getting on the agenda of the local Bar Association meetings.

4. RECOMMENDED ACTION TO SUPPORT THE ATTORNEYS:

Litigation expenses and out of pocket costs may be submitted by a Plan Attorney for reimbursement, and will typically be requested at the conclusion of the case. Judges within the District have offered general assistance in helping the attorneys, and other more experienced practitioners in an area have also offered assistance. In addition, the District's budget provides for limited funding for CLE credit and attendance to assist in the learning curve, and Indiana Legal Services, Inc. offers malpractice insurance to those attorneys handling a matter through the District 9 Plan.

5. EXPECTED RESULTS:

The Committee is optimistic with respect to this problem. It is anticipated that we will have 75% participation from the attorneys in Union County, 5 attorneys in Fayette County, 2 attorneys in Franklin County, and 3 attorneys in Rush County.

6. BENCHMARKS:

The number of attorneys willing to take pro bono cases within the District's Plan. The Committee believes that success in this regard would be as set forth above.

7. COSTS:

The costs associated with achieving the expected results would include the costs of publicity, attendance of speakers, and other minor costs in meeting with the attorneys to bring them within the Plan.

X Providing intake, screening, and referral of prospective clients:

Intakes are done by the Plan Administrator, who is also an intake paralegal with Indiana Legal Services, Inc. After the intake is complete and the Administrator has screened the client for income eligibility, the client may be referred to the District 9 Pro Bono program.

X Matching cases with individual attorney expertise, including the establishment of specialized panels:

When an attorney signs up to participate, a sign up sheet is used that allows the attorney to note their expertise and request what types of cases that will be assigned to them.

X Providing resources for litigation and out-of-pocket expenses:

The Plan does offer to cover costs for litigation and other miscellaneous costs, however, funds have not yet been requested from our volunteer attorneys.

X Providing the availability of consultation with attorneys who have expertise in areas of law in which a volunteer lawyer is providing pro bono civil legal service:

Indiana Legal Services, Inc. staff attorneys are available to our volunteer attorneys for assistance and information.

X Providing malpractice insurance for volunteer pro bono lawyers:

Indiana Legal Services, Inc. offers malpractice insurance to those attorneys handling a matter through the District 9 Plan.

X Establishing procedures to ensure adequate monitoring and follow-up, and to measure client satisfaction:

When a pro bono case is closed, satisfaction surveys are sent to the volunteer attorney and client.

X Recognizing pro bono civil legal service by lawyers:
A reception and awards are given to attorneys that have assisted in our program.

Please describe the expected results and the measures, which you will utilize to determine the value to the indigent of the proposed activity.

District 9 will use the number of cases assigned and the number of attorneys participating to measure the value of our program.

Please provide your timeline for implementing and evaluating the recommended activities.

District 9 will be involved in recruiting activities in the outlying counties between the months of January through June. It is our goal to have cases assigned in those counties before July 1, 2003.

List of Appendices

1. Volunteer Satisfaction Survey
2. Client Satisfaction Survey
3. Part-Time Plan Administrator Job Description
4. Volunteer Attorney Sign Up Form